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ABSTRACT

Input into the design, content, and development of a comprehensive resource tool--the Montana Educational Resources and Services notebook--was provided by the 16 members of a planning team made up of Office of Public Instruction (OPI) managers and consultants, selected Montana educators, and Northwest Regional Educational Laboratory Dissemination Program staff. This "mapping project" is intended to provide concise, accurate information to the state's legislators: to provide OPI with a well-organized tool for making informed referrals past program lines: to serve as a resource for orientation of new staff to Montana OPI programs and services: to provide a base for analysis of programs and service delivery: and to provide a base for analysis of local school utilization of programs and services. The publication will include synoptical data with coded maps describing state, federal, flow-through, and affiliated programs which provide resources to the state's schools, teachers, and students. This report includes a summary of the three sessions, as well as an individual report on each of the sessions and a meeting agenda. (RAA)

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MONTANA STATE DISSEMINATION WORKSESSIONS

"A Study of Programs and Services"

Office of Public Instruction
Helena, Montana

November 14, 1979
December 12-13, 1979
January 3-4, 1980

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Northwest Regional Educational Laboratory

An Action Report

Northwest Regional Educational Laboratory
DISSEMINATION PROGRAM
710 S.W. Second Avenue
Portland, OR 97204

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Introduction

The Montana Dissemination Worksessions emerged as a keystone in the Office of Public Instruction's (OPI) quest for educational improvement through increased communication and awareness of resources and services. These worksessions, sponsored by the OPI Department of Administrative Services and conducted in cooperation with Northwest Regional Educational Laboratory (NWREL) Dissemination Program, were held on November 14, 1979, December 12-13, 1979 and January 3-4, 1980.

Attending the sessions were OPI managers and consultants, along with other selected Montana educators and NWREL Dissemination Program staff. These participants' knowledge of and expertise in Montana's educational systems and dissemination planning enabled them to provide input into the design, content and development of a comprehensive resource tool--the Montana Educational Resources and Services notebook. The publication envisioned includes synoptical data with coded maps describing state, federal, flow-through and affiliated programs which provide resources and services to Montana schools, teachers and students.

This extensive data collection effort, better known as the "mapping project,"[1] was proposed to accomplish the following objectives:

- To provide concise, accurate information in a useable format to Montana's legislative and congressional delegation
- To provide OPI staff with a well-organized tool in order to make informed referrals past program lines

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[1] Mapping, in this context, is defined as the process of inventorying current services and resources within a standardized format, along with displaying the data geographically.

- To serve as a resource for orientation of new staff to Montana OPI programs and services
- To provide a base for analysis of program and service delivery
- To provide a base for analysis of local school utilization of programs and services

The cooperative atmosphere cultivated through these worksessions again demonstrated the OPI's sincere commitment to providing the best educational system possible for the youth of Montana.

Background

Prior to summarizing the worksessions, it may be helpful to provide some background on how they came to be held, especially for readers of this document who were not directly involved in the planning efforts.

The Office of Public Instruction, recognizing the value of inter-agency collaboration and sharing, particularly in an era of scarce resources, has worked closely with the Northwest Regional Educational Laboratory's Dissemination Program to create a system for resource exchange in the state and the region. It was in this context that Office of Public Instruction staff joined with the Dissemination Program and the other states in the region to implement the Northwest Regional Dissemination Configuration Project.[2]

Supported by the National Institute of Education (NIE), the Configuration Project provided technical assistance to the states in sponsoring a dissemination conference or worksession and assisted in the development of a notebook describing available services and resources.

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[2]Together, the states of Alaska, Hawaii, Idaho, Montana, Oregon and Washington comprise the Northwest Regional Exchange (NWRx), coordinated by the NWREL Dissemination Program. The Configuration is a special project of the Exchange.

The Montana representative to the NWRx Advisory Board[3], Mr. Phil Ward, along with two Configuration Project steering committee members, a core group of OPI staff and selected Dissemination Program staff comprise the planning team for the mapping effort. (See Attachment A)

Worksession Activities

Substantial development of the resource notebook was achieved by the planning team throughout the series of worksessions. The following is an attempt to provide an integrated account of the plans and agreements outlined from September, 1979 through January, 1980. (Detailed documentation of the worksessions is included in Attachments B, C, D.)

In September and October, the NWRx State Consultant to Montana worked closely with the NWRx Advisory Board/Steering Committee members to begin conceptualizing the project and to develop the agenda for the first worksession. The groundwork for the project was established at the November 14 session, with participants being introduced to the project and having the opportunity to probe the prospective venture. (See Attachment E) Ms. Virginia Thompson, NWREL Dissemination Program Director, added to the conceptual base with a presentation on national dissemination resources, issues and perspectives.

Subsequent meetings of the group resulted in agreements as to the scope, purpose and design of the notebook, as well as the roles and assignments of the participants. Highlights of these sessions included:

- Four sections of the notebook were identified: state and federal programs with state maps, county maps, interagency relationships and flow-through programs.

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[3]The Northwest Regional Exchange (NWRx) Advisory Board, which is comprised of one representative from each of the six states, provides direction and leadership in dissemination activities throughout the region.

- Schemas for state and county map displays were designed which include a matrix system.
- Editorial guidelines, projected timelines and front matter content for the publication were proposed.
- Significant data collection was accomplished.

An important element which has been present at each worksession has been the continuing attention given to assure that the notebook would be useful, accurate and maintainable over time. Initial plans for a simpler product had a fall completion date planned. By the November 14 meeting it had become apparent that an expanded version would have more uses. Therefore, a new completion date for a draft copy of the expanded version was planned for mid-January. Subsequent worksessions continued to increase the quantity of data being collected, as well as to alter some elements of the notebook format. A new timeline was therefore established which includes a distribution date for the notebook by July 1, 1980.

At the time of this report, worksessions were already planned for February 25-26 and March 25-26, 1980. Focus of these sessions will be to complete the resource notebook in draft form and to begin the analysis of the "picture" provided by this product.

Recommendations

A number of recommendations have been voiced by the OPI staff involved in developing the resource notebook. These include:

- Provide for an annual updating of the notebook
- Plan for a distribution process which allows for acquainting other staff with the breadth of contents included
- Investigate the potential of computerizing some portions of the information contained in the notebook
- Increase the number of OPI staff who are directly involved with reviewing, analyzing and interpreting the data

- Provide for ongoing feedback to assure that the product is maximally useful

- Use the information generated as a planning resource for Montana OPI as strategies are being developed for assisting the schools in the state

- Use the notebook in conjunction with other types of assessment activities in the state and region to increase awareness of existing needs

It is expected that the final product emerging from the state's extensive involvement in its mapping effort will both assist in planning for and providing assistance to Montana schools, and will provide a model for other states seeking to conduct a thoroughgoing inventory of their educational resource and service provisions.

ATTACHMENTS

A Participants List

B November 14, 1979 Meeting Report

C December 12-13, 1979 Meeting Report

D January 3-4, 1980 Meeting Report

E November 14, 1979 Meeting Agenda

MONTANA
STATE
DISSEMINATION
WORKSESSIONS

ATTACHMENT A

PLANNING TEAM PARTICIPANTS LIST

Office of Public Instruction Staff

Bill Connett	Program Services Unit Manager
Lyle Eggun	Co-Director, School Community Services
Dean Lindahl	Director, Federal Programs
Ron Lukenbill	Special Education Consultant
Wayne Pyron	Project MINE Consultant
Paris Siules	School Food Services Manager
Phil Ward	Administrator, Administrative Services
Barbara Welter	Public Information Manager
Ron Wirtz	Program Manager ESEA Title IV

NWRx Advisory Board and Configuration Steering Committee Members

Phil Ward	NWRx Advisory Board Member
Dick Schmidt	Superintendent, Park City School District
Jim Watkins	Educational Service Representative

NWREL Dissemination Program Staff

David Campbell	NWRx State Consultant to Montana
Mimi Maduro	Editor
Rene Dino	Technical Assistance Consultant
Virginia Thompson	NWREL Dissemination Program Director

ATTACHMENT B

MONTANA STATE MAPPING MEETING REPORT

November 14, 1979

Persons Present:

Phil Ward	OPI, Administrator
Dean Lindahl	OPI, Director of Federal Programs
Barbara Welter	OPI, Director of Public Information
Ron Wirtz	OPI, Program Manager, ESEA Title IV
Jim Watkins	Educational Representative
Dick Schmidt	Superintendent, Park City School District
Virginia Thompson	NWREL Dissemination Program
David Campbell	NWREL Dissemination Program

Three major purposes provided the framework for this meeting held in Helena, Montana, November 14, 1979. These were:

- to report progress on the development of a resource notebook
- to solicit additional input in regard to the design and potential use of the resource notebook
- to secure additional assistance in developing the notebook

Although these remained as the primary purposes, the planning of next steps, determining notebook maintenance and updating procedures and strategizing to involve more state agency people became secondary objectives of the meeting.

A general overview of the mapping/abstracting effort along with a number of examples was provided by Phil Ward. Included as part of the overview was a description of the potential use and value this project could have for the educational improvement efforts in Montana. This sharing of the state perspective was followed by a review of potential regional benefits by David Campbell and Virginia Thompson which included the relationship of this project to the Northwest Regional Exchange (NWRx) and to the Dissemination Program at the Northwest Regional Educational Laboratory (NWREL).

Two groups of four were formed to facilitate the process for obtaining input in regard to the design and potential uses of the notebook. The initial consideration was the overall design of the notebook. Each group generated a list of programs/services which had not been identified for inclusion, but which have merit for being included and their concerns about the overall design of the notebook. A combined list of these items is appended to this report. Similarly, each group generated a list of potential notebook uses and these have also been appended. As a result of both of these efforts, it was further determined that a fourth section was needed which would include direct federal grants to schools and federal flowthrough monies which go to schools. Further, Ron Wirtz and Barbara Welter assumed responsibility for developing useable county maps for use in the second section of the resource notebook.

A discussion was held in regard to the assistance needed and methods for obtaining information for completion of the resource notebook. The conclusion reached was that the people who managed and/or worked directly with the various programs were the most logical ones to provide the information needed. This led into a discussion about ways to involve others in the ongoing planning and designing work. An agreement was made that each member of this group would assume the responsibility of bringing one additional person to the next meeting. In the meantime, Phil Ward will take responsibility for obtaining interim assistance by making personal contacts with others in the state agency.

It was further agreed that the actual maintenance of updating information could be best managed by the public information office. Tentative plans are to formally update the notebook contents on at least an annual basis, although it was agreed that it may be necessary to update more frequently. Additional input will be requested before a final decision is made.

A draft of the total notebook is to be completed by January 15, 1980. In order to accomplish this, a work session is scheduled for December 12 and 13, 1979 at which time this group plus others will convene in Helena.

Attachment #2 provides the detail for a work plan which will facilitate completion of this effort.

Attachment #1

Montana State Mapping Meeting
November 14, 1979

I. Concerns about the Overall Design of the Montana State Resource Notebook

- Information to be written in "plain English", avoiding jargon
- List of validated programs (IVD) included
- Maps to list county summaries
- Sources of energy allocations listed
- Listing of students affected by program
- Sub-program listings under OPI included
- Number of FTE/program/dollars included
- County distribution of federal funding included
- Summary of federal funding by congressional district included
- Summary of federal funding/state funding/students/taxable evaluation listed
- Summary of funded programs listed on reverse side of map
- A fourth section added to the notebook listing federal grant potentials

II. Agencies/Organizations to be Considered for Possible Inclusion in the Notebook

- Private schools
- Teacher Centers
- Teacher Corps
- Head Start
- Follow-Through
- Indian Reservations
- National Center for Career Education (NCCE)
- State Library Resources Commission

- Film Library
- University/higher education system
- Intergovernmental relationship (i.e., health)
- Department of Energy
- Consumer Education programs
- State institutions for handicapped, deaf, etc.
- Federal programs for districts (flowthrough)
- Grant programs direct from federal level
- Associations such as:
  - -- MSBA
  - -- SAM
  - -- MEA
  - -- MFT
  - -- PTA
  - -- State Student Councils
  - -- Advisory Councils (state and local)

III. Potential Uses of the State Resource Notebook Identified

- Orient state education agency (SEA) staff
- Orient local education agency staff
- Inform state legislators and congressional delegation
- Provide SEA staff baseline for testifying before Legislative Committees
- Provide an analysis of programs/services
- Define priorities for SEA services
- Promote coordination of SEA staff effort
- Provide a reference for direct calls about office programs
- Provide information for the public and school boards
- Provide a base for regional analysis of service patterns

- Provide for comparison of services/programs
- Provide resources for schools of education, colleges and universities
- Assist in writing state plans
- Provide information for state, county and city libraries
- Provide information to NWREL, NIE and USOE

Attachment #2

Planning Activities & Tasks	Who	Completion Dates	Meeting Dates
1. Gather information for abstracts	Phil - Chief	Mid Dec.	Dec. 12-13
2. Write abstracts (Section I)	↓	↓	↓
3. Prepare state maps	Phil & others		
4. Prepare county maps	Ron & Barbara	Mid Dec.	
5. Prepare information for county maps	Team	By Mid Dec.	
6. Complete county maps	Team	Mid Dec.	
7. Prepare information for Section III (Inter-agency Relationships)	Team	Mid Dec.	
8. Complete abstracts for Section III	Team	Jan. 1	
9. Organize Section IV (Federal Grants and Flowthrough)	Dean Lindahl	Mid Dec.	
10. Gather data and information for Section IV	" "		↓
11. Write abstracts for Section IV	" "		
12. Compile complete set of all four sections	(Team)	Dec. 31	to be determined
13. Review of information	Team	Jan. 3, 1980	↓
14. Correct and/or modify	(Team)	Jan. 8, 1980	
15. Draft of Resource Notebook	Reps to NW	Jan. 15, 1980	Jan. 15-16-17

ATTACHMENT C

MONTANA STATE MAPPING MEETING REPORT

December 12-13, 1979

Individuals participating in the two-day worksession:

Phil Ward	OPI, Administrator
Dean Lindahl	OPI, Director, Federal Programs
Ron Wirtz	OPI, Program Manager, ESEA, Title IV
Wayne Pyron	OPI, Consultant, MINE Program
Barbara Welter	OPI, Public Information Manager
Jim Watkins	OPI, Educational Service Representative
Lyle Eggum	OPI, Co-Director, School Community Services
Bris Skiles	OPI, School Foods Services Manager
David Campbell	NWREL Dissemination Program
René Pino	NWREL Dissemination Program
Mimi Maduro	NWREL Dissemination Program

This two-day worksession, held as a follow-up to the November 14, 1979 mapping meeting, had as its primary purposes:

- To report progress on the development of the resource notebook
- To write/edit abstracts on state and federal programs and compile data for county and state maps
- To identify next steps and assign tasks to coordinate completion of the notebook

The session opened with remarks by Phil Ward, who expressed his thanks to all attending for their time and involvement in the resource notebook effort. After a brief review of the project's scope, the tasks at hand were identified: Writing state and federal OPI program abstracts, editing abstract drafts and compiling data for state and county maps. Many of the program abstracts will include a state map identifying specific program sites. The county maps will summarize educational activities in each of the 56 counties by elementary district and by secondary district, thus accounting for approximately 112 county maps.

As the group divided into teams to complete the designated tasks, it

was stressed that the following objectives of the notebook be kept in mind:

- To provide rapid access and accurate information to Montana's legislative and congressional delegation
- To provide OPI staff with a tool for making informed referrals past program lines

The responsibilities of the five teams were as follows:

- Federal program abstracts - Phil/Dean
- State program abstracts - David/Wayne
- Abstracts with state maps - René/Ron
- County map with districts - Jim/Bris
- Editors - Barbara/Mimi

Agreements reached during concluding session on Thursday afternoon were:

- The notebook will be updated annually on July 1. This edition will be dated July 1, 1979, with a subsequent edition in July, 1980. Barbara Welter, Public Information Manager, will be responsible for updating the notebook.
- An editorial guideline was established: Each abstract will identify those aspects of the program which link it to improved educational opportunities for students.
- Each abstract will be reviewed by the program director who will "sign off" to the accuracy of the abstract.
- The following agencies/organizations will be included in the notebook:
  - Teacher Centers
  - Teacher Corps
  - Head Start
  - National Center for Career Education
  - Indian Reservations
  - State Library Resources Commission
  - Film Library

- University/higher education system (abridged profile)

- State institutions for handicapped, deaf, etc.

- Advisory Councils to county superintendents

- Educational and professional organizations (list only)

- In cases where there is a program director and a consultant available as a contact person, both persons will be listed as "contact" on the abstract.

- The front matter of the notebook will include:

  - Opening letter from Georgia Rice/Phil Ward

  - "Introduction" including:

    - Project history and development
    - Explanation for how to use notebook/layout, etc.
    - Copyright disclaimer--permission to reproduce
    - Price disclaimer
    - Date of verification of information
    - Explanation of updating process--changes/corrections
    - Organizational chart
    - Acknowledgments

  - Table of contents or alphabetical listing

- The appendix of the notebook will include:

  - Glossary of terms, such as:

    - CFDA, Catalog of Federal Domestic Assistance
    - P.L., Public Laws
    - JDRP, Joint Dissemination Review Panel
    - NIE, National Institute of Education
    - USOE, United States Office of Education
    - ERIC, Educational Resources Information Center
    - NWREL, Northwest Regional Educational Laboratory
    - State institutions

  - Index by ERIC descriptors

- Indexing of the abstracts will be completed by Mimi Madure.

- All completed abstracts will be channeled to Barbara for editing. Barbara will track the status of each program abstract.

- Barbara will prepare a draft of the introduction to be reviewed at the next meeting. Mimi will prepare a sample index which will also be reviewed.

- The group will reconvene on Thursday, January 3, 1980 to continue development of the notebook.

- A draft of the first two sections of the notebook will be prepared to share at the Northwest Regional Exchange Advisory Board meeting in Portland on January 15, 1980.

Members of the five teams reported their progress during the past two days. In summarizing these reports:

- Approximately 15 state program abstracts have been written with six yet to be completed. Wayne Pyron will write the remaining abstracts prior to the January 3 meeting.

- There are approximately 50 federal programs with 32 written to date. It is anticipated that the remaining abstracts will be completed by the January 3 meeting.

- An inventory of state and federal programs will be assessed to determine if all existing programs have been included.

- Twelve of the 56 county maps have been summarized to date. The plotting and outlining of these maps is tedious and time consuming work. Possibly someone will be assigned to assist in completing this task.

- A "legend" was designed for designating the state maps with county lines. Ron Wirtz presented information on how data will be collected on title projects across the state.

- Editing of 41 abstracts has been completed.

Items to be considered at the January 3 meeting and future sessions:

- Explore the possibilities of using thermofax for "overlay" county maps

- Determine the number of copies to be printed

- Explore the possibility of computerization of notebook

- Review of front matter and indexing system

- Continue exploration of potential uses of the notebook, including analysis of the data

Words of appreciation as to the productivity and cooperative atmosphere during the session were expressed by the participants.

ATTACHMENT D

MONTANA STATE MAPPING MEETING REPORT

January 3-4, 1980

Participants:

Phil Ward	OPI, Administrator
Dean Lindahl	OPI, Federal Programs Director
Ron Wirtz	OPI, Program Manager, ESEA Title IV
Bill Connett	OPI, Program Services Unit
Wayne Pyron	OPI, Project MINE
Jim Watkins	Educational Services Representative
Ron Lukenbill	OPI, Special Education
David Campbell	NWREL Dissemination Program

The participants at the worksession continued to collaborate on the development of the Montana educational resources and services notebook by focusing on the following aspects:

- examining the informational display encapsulated on the county maps including the development of a matrix system.
- demonstrating the capability of the user to track general and specific information embodied on the state maps.
- sharing the progress of participants' particular areas of responsibility and planning for upcoming production coordination efforts.

The completed Sections, I and II, describing state and federal programs were reviewed by the participants. Dean Lindahl and Wayne Pyron reviewed the design for the county map section suggesting that an overlay type page be considered to portray information about elementary and secondary school districts. Furthermore, a matrix designating existing services and programs including staff size, enrollment, etc. could be placed on the page facing the county map. This arrangement would lend itself to a high degree of readability and versatility.

The group continued to conceptualize and design strategies for Sections III and IV of the notebook. A narration describing the relationships of the OPI

to other external organizations, e.e. NIE, NWREL, Department of Health, will comprise Section III. Section IV will contain abstracts of flow-through and direct grant programs.

Ron Wirtz presented an overview of the informational display he developed for state maps demonstrating how the user could track general and specific types of information. This sample cited comprehensive information concerning Title IV programs throughout the state. It was agreed that the same approach could be developed for Special Education projects, programs and services.

The participants agreed that the completed notebook would be prepared for distribution by July 1. The group will reconvene in Helena, Montana, on February 26-27 to continue their efforts.

ATTACHMENT E

MONTANA "MAPPING" WORKSESSION

November 14, 1979

AGENDA

• Introductions and Opening Comments	Phil Ward
• Presentations	
- National Dissemination Perspectives	Virginia Thompson
- The Northwest Regional Exchange (NWRX)	David Campbell
- The Mapping Project	Phil Ward
- The Relationship Between the NWRX and the Mapping Project	David Campbell and Phil Ward
- Objectives of the Meeting	Phil Ward
• Input Sessions	
- Relationship of Design to Group Needs	
- Adequacy of Information	
- Maintaining a Current File	
- Requests for Assistance	
• Proposed NWRX Activities	
• Closing Remarks	